

MAVEN User Guide for Ryan White Case Managers

September 2017



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1. About MAVEN

MAVEN is the North Dakota's Electronic Disease Surveillance System. It is web-based, client-centric surveillance system that allows tracking disease diagnosis and other information for a single person across different reportable conditions and surveillance models within the system.

Ryan White (RW) Case Management Agencies will use MAVEN to enter client eligibility information, screening information, update contact information for clients, and monitor client medical outcomes through lab-work and ADAP reimbursed medications. This eligibility, services, and ADAP medications data are used to complete the annual HRSA reports including the Ryan White HIV/AIDS Services Report (RSR) and the AIDS Drug Report (ADR).

In addition to reporting requirements, MAVEN access has benefits for the case managers by allowing them access to HIV Surveillance data such as lab work. Lab data is electronically imported into the system. Close monitoring of the lab values enables case managers to respond in a timely manner to clients that are not retained in medical care or adherent to their treatment.

MAVEN website is: <https://apps.nd.gov/maven/login.do>. Enter assigned username and password. To reset password, please contact the NEDSS Coordinator at (701) 328-2385.


To obtain access to MAVEN, please contact the Ryan White Program Coordinator. Each user will be required to read and sign the *HIV.STD.Tuberculosis.Viral Hepatitis Security & Confidentiality Policy* and sign the Confidentiality Oath prior to getting access to MAVEN. Existing users are required to review the policy and sign the oath annually for continued access to MAVEN.

Each active client will be assigned to a RW case manager. A client cannot be assigned to multiple case managers. Case managers will only have access to their active clients.


Each HIV case houses information not related to RW Program such as HIV Surveillance data. Ryan White case managers are only required to enter the information outlined in this guide. You do not need to enter any additional information.

2. Client Search

Once you log in, you will see your name under Workflows. By clicking on it, you will be able to see the full list of your active clients. Click on the blue link to go to a specific client. Click on the Export All blue link to export your cases into an Excel spreadsheet. You can also see your

workflow by clicking on the gear icon () in the upper left corner.

Under Recent Events, you will be able to see up to 20 recent cases that you last entered.

To search for a specific client, enter their name or RW number in the Search Box in the upper right corner, or use the magnifying glass in the upper left corner ().

3. Client Dashboard

Maven Disease Surveillance Suite - TEST

Enter Case ID or Search Term... Search Gordana Cokrljic

Event Summary

Basic Information	Notes (Add/Edit Show My Notes)
Event ID: 100002545 Disease: HIV/AIDS Person: Bill Positive Birth Date: 09/12/1958 (Female) Phone: (701) 223-5656 Dates: Create Date: 02/04/2013 Event Date: 05/03/2017 Linked Events/Contacts: 0 linked event(s)/contact(s) (View) Attachments: 1 attachment(s) (Add) (View) Notifications: <div> Disease Status: Confirmed Event Type: Report Date Investigation Status: Closed Pregnancy Status: No Age: 58 Years HIV FAQ HIV Reference Guide Event is in workflows (View List) </div>	09/09/2014 03:35 PM (Generic) - Gordana Cokrljic [gcokrljic] RW 201501; MMIS ID: 90100000123

Edit Event Properties

Event Data Lab Results Concerns Persons Tasks Calendar Event Properties Event History

Question Package	Person	Last Update	Updated By	Status
1. Administrative	Event	05/17/2017	Gordana Cokrljic [gcokrljic]	Incomplete
2. Demographic	Bill Positive	09/09/2014	Gordana Cokrljic [gcokrljic]	Completed
3. Clinical	Bill Positive	05/17/2017	Gordana Cokrljic [gcokrljic]	Completed
5. Risk History	Bill Positive	05/17/2017	Gordana Cokrljic [gcokrljic]	Incomplete
6. Interview and Referrals	Bill Positive	03/10/2017	Mike Benz [mbenz]	Incomplete
7. Contact Investigation	Bill Positive	02/04/2013	Shanna Mills [smills]	Incomplete
8. Vaccine Information	Bill Positive	12/21/2015	Mike Benz [mbenz]	Completed
i. Enrollment Information	Bill Positive	05/22/2017	Mike Benz [mbenz]	Completed
ii. Ryan White Services	Bill Positive	05/18/2017	Mike Benz [mbenz]	Completed
iii. ADAP	Bill Positive	05/18/2017	Mike Benz [mbenz]	Completed
iv. Provider Information	Bill Positive	09/09/2014	Gordana Cokrljic [gcokrljic]	Completed

View Question Package Wizards RW Case Managers View Wizard

Coordinator HIV/AIDS Case Report
Field Epi's HIV Wizard
HIV Contact
Out of state wizard
RW Case Managers

You are in the Test Environment for Maven Disease Surveillance Suite - TEST

Once you are in the case, this is the main page, or dashboard. It has two sections. The upper section is Event Summary, and the lower section is Tabs.

Event summary has two sections: Basic Information and Notes. Basic information lists client demographics, and additional HIV surveillance information including the date and age of diagnosis. Notes section lists the notes between the HIV Surveillance Coordinator and the Field Epidemiologists. You may enter information here pertaining to the client's sexual contacts, pregnancy status, client relocating, etc. However, for noting any RW related information, please use the notes in the Enrollment Package.

The bottom portion of the client dashboard lists different Tabs. Event Data Tab has question packages including three packages for RW clients: Enrollment Information, Ryan White Services, ADAP.

You may enter information by going to the package directly, or by going to the RW Case Management Wizard which will have questions from all three packages in one place.

4. RW Case Manager Wizard

Maven Disease Surveillance Suite - TEST

Enter Case ID or Search Term... Search Gordana Cokrlj

Event Summary

Basic Information

Event ID: 100002545
Disease: HIV/AIDS
Person: Bill Positive Birth Date: 09/12/1958 (Female) Phone: (701) 223-5656
Dates: Create Date: 02/04/2013 Event Date: 05/03/2017
Linked Events/Contacts: 0 linked event(s)/contact(s) (View)
Attachments: 1 attachment(s) (Add) (View)
Notifications: Disease Status: Confirmed
Event Type: Report Date
Investigation Status: Closed
Pregnancy Status: No
Age: 58 Years
HIV FAQ
HIV Reference Guide
Event is in workflows (View List)

Notes (Add/Edit | Show My Notes)
05/09/2014 03:35 PM (Genetic) - Gordana Cokrlj [gcokrlj]
RW 201501, MMIS ID: 90100000123

Edit Event Properties

Event Data Lab Results Concerns Persons Tasks Calendar Event Properties Event History

Question Packages

Question Package	Person	Last Update	Updated By	Status
1. Administrative	Event	05/17/2017	Gordana Cokrlj [gcokrlj]	Incomplete
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3. Clinical	Bill Positive	05/17/2017	Gordana Cokrlj [gcokrlj]	Completed
5. Risk History	Bill Positive	05/17/2017	Gordana Cokrlj [gcokrlj]	Incomplete
6. Interview and Referrals	Bill Positive	03/10/2017	Mike Benz [mbenz]	Incomplete
7. Contact Investigation	Bill Positive	02/04/2013	Shanna Mills [smills]	Incomplete
8. Vaccine Information	Bill Positive	12/21/2015	Mike Benz [mbenz]	Completed
i. Enrollment Information	Bill Positive	05/22/2017	Mike Benz [mbenz]	Completed
ii. Ryan White Services	Bill Positive	05/18/2017	Mike Benz [mbenz]	Completed
iii. ADAP	Bill Positive	05/18/2017	Mike Benz [mbenz]	Completed
iv. Provider Information	Bill Positive	09/09/2014	Gordana Cokrlj [gcokrlj]	Completed

View Question Package Wizards RW Case Managers View Wizard

Coordinator HIV/AIDS Case Report
Field Epi's HIV Wizard
HIV Contact
Out of state wizard
RW Case Managers

You are in the Test Environment for Maven Disease Surveillance Suite - TEST

Select the RW Case Managers wizard from the drop-down list, and click on View Wizard.

To advance through the fields in the Wizard, press Tab button.

5. RW Wizard: General Administrative Section

In the Wizard, you will enter all the client eligibility data.

Maven Disease Surveillance Suite - TEST

RW Case Managers - Bill Positive - HIV/AIDS

GENERAL ADMINISTRATIVE

Reassign To: Gordana Cokric

State Patient Number: 201501

MMIS Number: 90100000123

*****If client has a new address proceed to Person's tab to enter the new address information*****

CLIENT ENROLLMENT INFORMATION

Enrollment Status	Active
Enrollment Date	01/16/2014
Date the client is to Re-enroll	04/01/2015
Actual date client Re-enrolled	11/06/2015
Case Management Site	Fargo Cass Public Health
Case manager assigned to Client:	Kristi Lee-Weyrauch
Pharmacy Site	MeritCare Broadway Pharmacy
Case closed date	05/01/2015
Why no longer active?	Relocated
Where did they move?	Montana
Enrollment Status	Active
Enrollment Date	08/02/2015
Date the client is to Re-enroll	10/01/2016
Actual date client Re-enrolled	04/05/2016
Case Management Site	Fargo Cass Public Health
Case manager assigned to Client:	Kristi Lee-Weyrauch
Pharmacy Site	MeritCare Broadway Pharmacy
Case closed date	MM/DD/YYYY
Enrollment Status	Active
Enrollment Date	01/01/2012
Date the client is to Re-enroll	10/01/2013
Actual date client Re-enrolled	12/01/2013
Case Management Site	
Case manager assigned to Client:	
Pharmacy Site	
Case closed date	MM/DD/YYYY
Enrollment Status	Active
Enrollment Date	01/01/2014
Date the client is to Re-enroll	10/01/2014
Actual date client Re-enrolled	MM/DD/YYYY
Case Management Site	

You are in the Test Environment for Maven Disease Surveillance Suite - TEST

Reassign To box states to which case manager the client is currently assigned to. Case managers can only see those active clients that are assigned to them. They can reassign a case to the program coordinator if they are closing the client, or to another case manager if the client has moved to another area. Once the case is reassigned, the case manager will not be able to see that client after they exit the case.

State Patient Number (or RW number) is the number assigned by the HIV Surveillance program and is used for RW services reimbursement. Use this number on the monthly requests for reimbursement.

MMIS Number (or ADAP number) is assigned to RW clients in MMIS and is used for ADAP medication billing. Patients must provide this number to the pharmacy in order to get their medications reimbursed through ADAP.

6. RW Wizard: Client Enrollment Information

Maven Disease Surveillance Suite - TEST

RW Case Managers - Bill Positive - HIV/AIDS

Enter Case ID or Search Term... Search Gordana Cokric

[Jump To...] Save Save & Stay Cancel

GENERAL ADMINISTRATIVE

Expand Details

Reassign To: Gordana Cokric

State Patient Number: 201501

MMIS Number: 90100000123

****If client has a new address proceed to Person's tab to enter the new address information****

CLIENT ENROLLMENT INFORMATION

Enrollment Status: Active

Enrollment Date: 01/16/2014

Date the client is to Re-enroll: 04/01/2015

Actual date client Re-enrolled: 11/06/2015

Case Management Site: Fargo Cass Public Health

Case manager assigned to Client: Kristi Lee-Weyrauch

Pharmacy Site: MeritCare Broadway Pharmacy

Case closed date: 05/01/2015

Why no longer active? Relocated

Where did they move? Montana

Enrollment Status: Active

Enrollment Date: 08/02/2015

Date the client is to Re-enroll: 10/01/2016

Actual date client Re-enrolled: 04/05/2016

Case Management Site: Fargo Cass Public Health

Case manager assigned to Client: Kristi Lee-Weyrauch

Pharmacy Site: MeritCare Broadway Pharmacy

Case closed date: MM/DD/YYYY

Enrollment Status: Active

Enrollment Date: 01/01/2012

Date the client is to Re-enroll: 10/01/2013

Actual date client Re-enrolled: 12/01/2013

Case Management Site:

Case manager assigned to Client:

Pharmacy Site:

Case closed date: MM/DD/YYYY

Enrollment Status: Active Add New

Enrollment Date: 01/01/2014

Date the client is to Re-enroll: 10/01/2014

Actual date client Re-enrolled: MM/DD/YYYY

Case Management Site:

You are in the Test Environment for Maven Disease Surveillance Suite - TEST

Client Enrollment Information lists the enrollment spans and the case management agency information for the client.

To enter enrollment information, please fill out the following.

Enrollment Status

- Select Active

Enrollment Date

- Enter the date when you signed the application

Date Client is to Re-enroll

- Enter the date of the next recertification cycle
 - Re-enrollment cycle starts on April 1st. Recertification cycle starts on October 1st.

Actual Date Client Re-enrolled

- Leave blank for newly enrolled clients

- For existing clients, enter the date when the case manager signed the recertification form

Case Management Site

- Select your agency
- Client only be assigned to one case management agency and case manager at a time

Case Manager Assigned to the Client

- Select your name

Pharmacy Site

- Select the pharmacy where client will fill their prescription if receiving ADAP assistance

Case Closed Date

Case Closed Date will be blank for active clients. If closing a client, enter the case closed date and select a reason for closure.

A new eligibility period must be started and the information above filled out each time the client enrolls into the program. **Do not** overwrite the new enrollment information over a past enrollment span.

7. RW Wizard: Client's Income, Assets, and Benefits

Maven Disease Surveillance Suite - TEST

Enter Case ID or Search Term... Search Gordana Cokric

RW Case Managers - Bill Positive - HIV/AIDS

[Jump To...] Save Save & Stay Cancel

Case closed date MM/DD/YYYY

CLIENT'S INCOME, ASSETS AND BENEFITS

Year (t)	
Year (t)	2014
Year (t)	2015
Year (t)	2016
Year (t)	2016
Year (t)	2017 Add New

Monthly salary/wages (gross) _____
Other monthly income (gross) _____
Total monthly income _____
Poverty level percentage (%) _____
Number of people in your household, including you, that you support _____
How many dependent minor children do you have living with you? _____
Client's housing status at the end of the reporting period _____
Please indicate all types of insurance for client
☐ ADAP Premium Assistance
☐ IHS
☐ Medicaid, CHIP or other public plan
☐ Medicare
☐ No insurance
☐ Other Public
☐ Other
☐ Private
☐ Unknown
☐ VA, Tricare and other military health care

Policy number of insurance: _____
Primary HIV medical care: _____
Client Notes _____
Did the patient attest that the information above is true and accurate? _____
Date Case Manager notified: MM/DD/YYYY
Effective date of change: MM/DD/YYYY

CLIENT COUNSELING AND SCREENING

Date: 09/16/2014
Date: 04/01/2015 Add New
Date: 09/16/2014

Clients Income, Assets, and Benefits section collects income and insurance information. This information will be entered with each enrollment, re-enrollment, and recertification.

Each year, client will have at least two iterations (the orange outline marks one iteration) under Client's Income, Assets and Benefits for that year. One set will be for re-enrollment, and one for recertification (client in the picture has 2 iterations for 2016).

For reporting purposes, the last income in the calendar year is reported. Changes in income off-cycle do not need to be entered in MAVEN, as they will be entered with re-enrollment or recertification.

All types of insurance status that the client had during the year must be entered in MAVEN and will be reported. Anytime client's insurance status changes, that information must be entered in MAVEN. Add another Year and all the questions. Please complete the full set of questions, including the income (even if same as in the previous iterations). If any of the income information is missing, the reporting information will be incomplete.

To add income/housing status/insurance information, click on Add New.

Year

- Enter the current year and press Tab

Monthly Salary/Wages (Gross)

- Enter the client's monthly gross income
- Enter income rounded to the nearest whole number. Do not enter decimal places

Other Monthly Income

- Enter any other income that clients or household members receive

Total Income

- Press Tab and total income field will self-populate

Poverty Level Percentage (%)

- Household income/guideline x 100 = % household poverty level
- Current poverty guidelines can be found at: <https://aspe.hhs.gov/poverty-guidelines>
- Online FPL calculator: <http://www.safetyweb.org/fpl.php>

Please indicate all types of insurance for the client (select all that apply)

- ADAP Premium Assistance
 - Select if the client's premium is paid by the case manager or the RW program coordinator using ADAP funds
- Indian Health Services (IHS)
- Medicaid, CHIP, or other public plan
 - If client has Medicaid, select whether it is Traditional or Medicaid Expansion
- Medicare
 - Select all the parts that client is enrolled in
- No Insurance
 - Select if client is uninsured
 - Please provide a brief explanation in the notes section why the client is uninsured
- Other
 - Select if insurance does not fit in another category
 - Specify the name and type of insurance, and the policy
 - If client has another state's Medicaid or a private policy that does not cover the client in ND, please select uninsured instead of other
- Private
 - Employer (Group)
 - Individual (health plan purchased through the Marketplace, COBRA, or insurance purchased directly from the insurance company)

Policy Number

- Enter the policy number for the private insurance, Medicaid, or Medicare Part D.

Notes

- Enter any notes pertinent to the case such as insurance information, or efforts in obtaining coverage for the uninsured clients

Date Case Manager Notified

- Enter date you signed the recertification form, or the date you were notified of any changes

Effective Date of Change

- Enter effective date of change if provided, otherwise leave blank
- Date of change always pertains to change in insurance coverage

8. RW Wizard: Client Counseling and Screening

CLIENT'S INCOME, ASSETS AND BENEFITS	
Year (d)	2014
Year (d)	2015
Year (d)	2016
Year (d)	2016
Year (d)	2017 Add New

CLIENT COUNSELING AND SCREENING	
Date:	MM/DD/YYYY Add New
Date:	MM/DD/YYYY Add New
Has patient been screened for TB since HIV diagnosis?	Yes
Has patient been screened for Hepatitis B since HIV diagnosis?	Not medically indicated
Has patient completed the vaccine series for Hepatitis B?	Yes
Has the patient been screened for Hepatitis C since HIV diagnosis?	Yes
Date:	02/18/2015 Add New
Screening and Counseling Year:	

RYAN WHITE SERVICES

Screening and immunizations for Ryan White clients was implemented in grant year 2017.

Please complete the following questions with each re-enrollment.

- Has patient been screened for TB since HIV diagnosis?
- Has patient been screened for Hepatitis B since HIV diagnosis?
- Has patient completed the vaccine series for hepatitis B?
 - If the patient has a history of disease, or has been vaccinated, select "Not medically indicated"
- Has the patient been screened for hepatitis C since HIV diagnosis?
- Screening and Counseling Year

To enter the annual screenings and counseling information enter the year when the screenings were received, and press Tab button. Answer the following questions.

- Has client been screened for syphilis in the past 12 months?
- Has client been screened for chlamydia and gonorrhea in the past 12 months?
- Was client counseled about HIV transmission and risks in the past 12 months?

9. Client Enrollment

When enrolling a client, complete the:

- Client Enrollment Information,
- Client's Income, Assets and Benefits, and
- Client Counseling and Screening sections in the Wizard.

If the client has been previously enrolled, select Add New, and enter the new enrollment information. **Do not** overwrite over the past enrollment span.

10. Client Re-Enrollment

When re-enrolling a client:

- Complete the Client Enrollment Information by updating the Date the Client is to Re-Enroll to the recertification date (10/1/20xx).
- Enter the Actual Date Client Re-Enrolled from the Re-Enrollment Application.
- Add a new Year to the Client's Income, Assets and Benefits and complete the section.
- Complete the Client Counseling and Screening sections of the Wizard.

11. Client Recertification

Under Client Enrollment Information, change the date client is to Re-Enroll to the date of the next re-enrollment (04/01/20xx). Change the Actual Date Client Re-Enrolled to the date on the recertification.

Enter a new Year in the Client's Income, Assets and Benefits section, and complete all the information.

12. Closing Clients

When closing a client, enter the closing date and select one of the following reasons why the client is no longer active.

- Did not recertify eligibility (clients that do not complete the re-enrollment by April 30th, or recertification by October 31st)
- Non-compliance
- Ineligible, income too high (income above 400% FPL)
- Incarcerated (long-term incarcerated persons are not eligible for RW)
- Relocated
 - Enter where the client moved
- Deceased
- Unknown

Notify the RW Coordinator to close the case in MMIS and reassign the case out of your workflow.

Update the address in the Person Tab, if you know where the client moved.

13. Reassigning a Client to Another Case Manager

Clients moving to another part of the state should be reassigned to the case manager covering that area. Reassign the case to the new case manager, and update the case management agency/case manager for the current enrollment cycle.

Please provide the new case manager with the latest re-enrollment documentation and notify the RW Coordinator of the change.

The new case manager will need to update the address.

14. Ryan White Services Package

At the bottom, you will be able to see the services provided to the client. You may also see the services by going to the Ryan White Services Package on the Dashboard.

Currently, RW services are manually entered from the monthly Requests for Reimbursement submitted through the Payment Reporting System (PRS). Case managers do not need to enter services into MAVEN. You may use this information for reference.

15. ADAP Package

ADAP Package lists medications and copays/deductibles reimbursed by ADAP. These are manually entered from MMIS. Medications reimbursed by another payer where ADAP did not provide any assistance are not in MAVEN. Use this package to review medication adherence.

You can enter ADAP Package from the Wizard by clicking on the Jump To box in the upper right corner and selecting ADAP under Packages. Make sure to save your information before exiting the Wizard. Or you can save your information and once back on the Dashboard, click on ADAP under Packages.

16. Lab Results Tab

You can access labs by clicking on the Lab Results Tab. Single click will list the results in the Details under the Tabs. Double clicking on the lab will display the full lab result.

You can also go to Lab Results from the Wizard by clicking on the Jump To box. Any patient that has not had labs within the past 12 months, or has a detectable viral load should be contacted to assess their needs and re-engage them into medical care and treatment.

17. Vaccine Information Package

Vaccine Information Package imports vaccine information from ND Immunization Information System (NDIIS). To import the newest information from NDIIS, click on Query Registry.

18. Updating Client Address

Name	Gender	Birth Date	Address	Status
Bill Positive	Female	09/12/1958	456, Mandan, ND 58504	Active

Edit Person

Basic Information Address Information Demographic History Notes

To add or update or update a client's address, click on the Persons Tab and Edit Person.

Type	Address	Phone
Home	456 E Main Ave, Mandan, ND 58504	(H) (701) 223-5656

Add Address Type

Edit Address

Address Type: Home

Start Date: 07/13/2017

End Date: 01/01/2030

Street: 456 E Main Ave

City: Mandan

State: ND

Zip Code: 58504

County: Morton County

Country: USA

Home Phone: (701) 223-5656

Mobile Phone:

Work Phone:

Email: billp@google.com

Fax:

Contact Method:

Save Cancel Help

To add another address type, click on Add Address Type, and enter the new address information.

To update the current address, select the start date for the new address. The start date would be the earliest date of which you knew that persons lived at that address. Enter the street, city, state, zip code, and county and click on the Save button in the lower left corner.

If the client moved out of state, select the start date and delete the street address. Enter the city (if known) and state where the client moved to.

Note: Client address is updated with incoming labs. Sometimes the address will have additional numbers because of this. Those numbers can be deleted as they are not a part of the address.

Click on the Save button on the bottom left.

19. Saving Information

To save the entered information, click on the Save buttons in the upper right corner, or the lower left corner of the screen.

The information will be saved, and the screen will return to the client dashboard.